

RECORDS MANAGEMENT STAFF PAPER NUMBER 3

GUIDE FOR

FORMS MANAGEMENT

NOVEMBER 1969

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GUIDE FOR FORMS MANAGEMENT

I. GENERAL

1. Forms Management is an integral part of the Agency's Total Records Administration Program.

Some of the objectives of Forms Management are to:

- a. Insure the need for each existing or proposed form.
- b. Reduce the number of forms through consolidation and by eliminating obsolete ones.
- c. Simplify and improve essential forms.
- d. Distribute forms economically
- e. Devise procedures for forms use to provide maximum efficiency.

STATINTL

2. Responsibility for the administration of the Agency Forms Management Program is outlined in [REDACTED]
3. Component Records Officers are responsible for:
 - a. Designing or helping to design forms for component offices.
 - b. Ensuring that supplies of component forms are available.
 - c. Eliminating unnecessary forms.
 - d. Coordinating requests for new or revised forms with the Records Administration Staff and the Directorate Senior Records Officer.
 - e. Processing requests for the reprinting of official forms.
4. All Records Officers should be familiar with the following:
 - a. Form 30: Request for Approval of Form.
 - b. Form 30a: Form Stock Replenishment Notice, Coordination, and Approval Record.
 - c. Form 70: Printing Services Requisition.
 - d. Form 88: Requisition for Material and/or Services.
 - e. Form 1395: Loan and Purchase Request for Books and Periodicals.
 - f. Form 1490: Requisition or Turn-In for Administrative Supplies and Equipment.
 - g. Supply Catalog--Forms Printed.
(Issued by Supply Division, Office of Logistics)
5. Definitions:
 - a. Stock forms: Forms stocked by Office of Logistics and used by most agency offices. Usually they are prescribed by regulation, notice, handbook, or office procedure. In some instances a stock form is used by only one office but the quantity is large and the using office cannot house an adequate supply. (See Section VI.)

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- b. Non-Stock Forms: Forms used by the initiating office and stocked by that office. Occasionally another office may have a temporary use for some of these.
- c. Lead Time: Minimum time required to produce forms:
 - Printed in Agency -- 21-45 days lead time.
 - Printed outside Agency-- 120 days lead time.

6. Forms Used by the Agency:

- a. Agency Forms --forms which are standardized and prescribed by Agency Regulations, Notices, Handbooks, and Office Instructions and procedures.
- b. Forms of Other Government Agencies--Standardized forms approved by other Government departments, agencies, or establishments and required for use by the Agency.
 - (1) Atomic Energy Forms (AEC)
 - (2) Civil Service Commission Forms (CSC)
 - (3) Compensation Act Forms (CA)
 - (4) Department of Defense (DD)
 - (5) General Service Administration (GSA, OF or SF)
 - (6) Public Health Service (PHS)
 - (7) Department of State (AE, DS, DSP, FS)
 - (8) Treasury Department (SS, TD, W-2, W-4)
 - (9) Miscellaneous - District of Columbia, State of Maryland, State of Virginia Tax forms, GEHA, Navy, and Air Force.

II. REQUESTS FOR NEW OR REVISED AGENCY FORMS OR OTHER GOVERNMENT FORMS

1. Initiating Office:

- a. Complete Form 30 in duplicate.
- b. Attach draft of proposed form to Form 30. (Agency forms only)
- c. Prepare Form 70 for Non-Stock to be printed in the Agency.
- d. Prepare Form 88 for Non-Stock Forms to be printed outside the Agency.
- e. Prepare Form 1395 for Non-Stock forms to be purchased from Other Agencies.
- f. Where practicable, attach copy of notice, handbook, regulation, or office procedure prescribing use of form.
- g. Send request form and attachments to component Records Officer. (If it is to be a stocked form no Form 70 or 88 need be prepared).

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2. Component Records Officer:

- a. Check Form 30 for completeness.
- b. Review request and form draft.
- c. Check for an existing form that can serve the intended purpose.
- d. Approve or reject request.
- e. Send approved original of Form 30 and attachments to Records Administration Staff thru Directorate Senior RMO.
- f. File duplicate of Form 30 in pending file; place in suspense until new or revised form is completed and copy received; then file in active form file.
- g. Notify initiating office when supply of form is available.

III. REPRINTS OF APPROVED STOCK AGENCY AND OTHER GOVERNMENT AGENCY FORMS

1. Stock Management Branch, Office of Logistics:

- a. Prepare Form 30a and send to responsible component Records Officer.

2. Component Records Officer:

- a. Determine continued need of form.
- b. Determine proper quantity for at least 12 months supply.
- c. Approve or reject request.
- d. If approved unconditionally, send Form 30a with copy of form attached to Printing Services Coordinator, Printing Services Building.
- e. If other than unconditionally approved, send Form 30a to Records Administration Staff.

IV. REPRINTS OF APPROVED NON-STOCK AGENCY AND OTHER GOVERNMENT AGENCY FORMS

1. Initiating Office:

- a. Prepare Form 70 when form is printed in the Agency.
- b. Prepare Form 88 when form is printed outside the Agency.
- c. Prepare Form 1395 when forms is purchased from other Agencies.
- d. Send request form to Component Records Office with copy of the required form attached.

2. Component Records Officer:

- a. Review continuing need of form and quantity
- b. Send approved request form with copy of the required form to Printing Service Coordinator, Printing Service Building.

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V. NEW AND REPRINT DEPARTMENT OF STATE AND NAVY FORMS

1. Initiating Office:

- a. Prepare Form 30 if requested form has not been previously ordered.

2. Records Officers:

- a. Review and check Forms Catalog to see if available in Agency.
- b. Requisition supply if available.
- c. Send Form 30 to Records Administration Staff through Directorate Senior Records Management Officer.

VI. WHERE AND HOW TO GET SUPPLIES OF FORMS

1. Stock Forms (unclassified) - Available on the shelves of the Building Supply Offices in various buildings.

If there is no BSO in your building, prepare Form 1490 listing the forms need and send it to the BSO in the Headquarters Building, Room GJ-26.

2. Stock Forms (classified) - These forms are kept in safes and users must request them at the counter in the Headquarters BSO. These are not available in BSO's in other buildings and must be ordered on a Form 1490.
3. Non-Stock (classified and unclassified) - These forms are stored by the using office. If you need to know who is storing the forms, call your Component Records Officer.

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